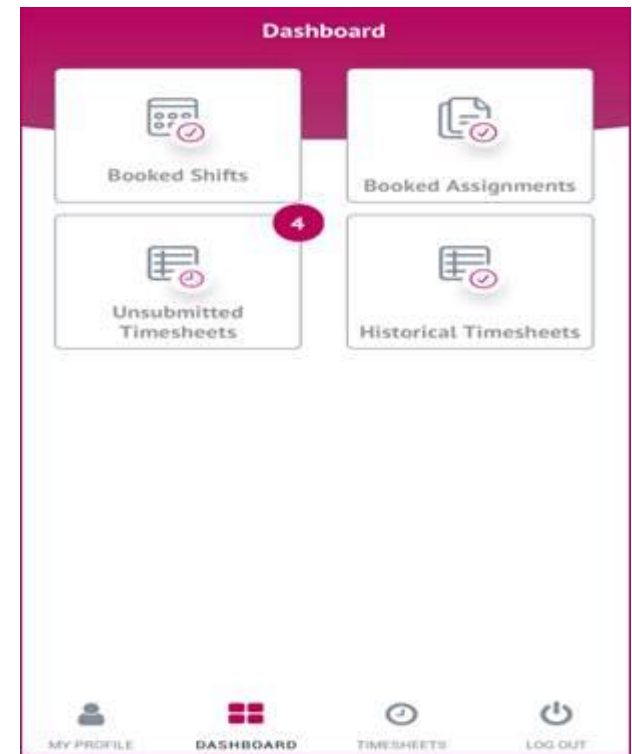# Welcome To VMS365 Client Userguide

August 2017

Retinue Health App

As well as our fully functional website www.vms365.co.uk, Retinue now have a app that you can download from any Smart phone or tablet to use on the go! Simple go to the 'App store' and search 'Retinue client app'
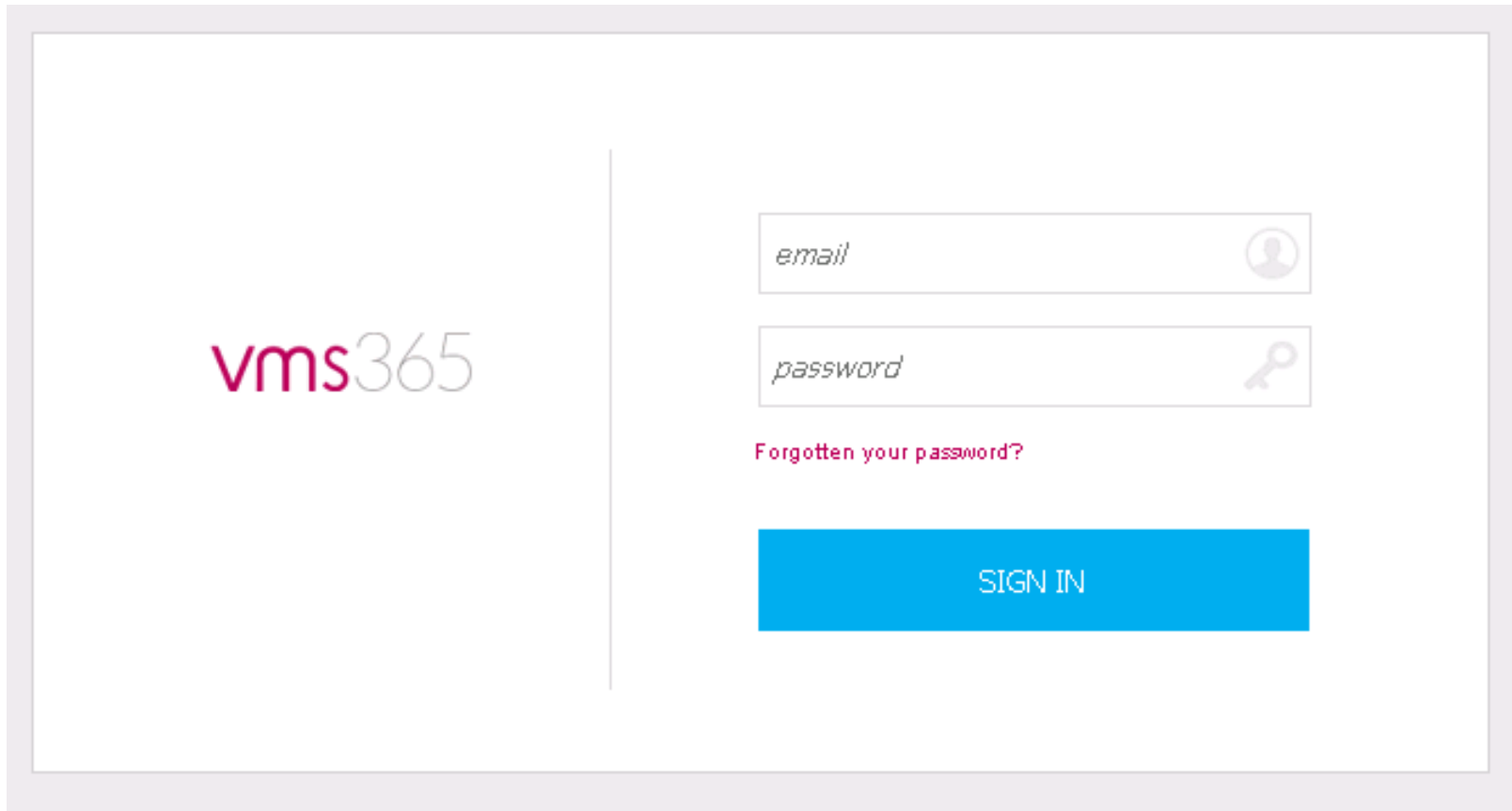
By downloading the app you will be able to do any of the below features on the go and with the ease of not having to log on to a computer

➢ Add on shifts/assignments

➢ View any outstanding shift/Assignments

➢ Book/Confirm candidates in to shifts

➢ Authorise timesheets

Retinue

Sign in

email

password

Forgotten password?

Sign In

Dashboard

Booked Shifts

Booked Assignments

Unsubmitted Timesheets

Historical Timesheets

MY PROFILE   DASHBOARD   TIMESHEETS   LOG OUT

Login Page

➢ URL is**:** **www.vms365.co.uk**

➢ Username is your e-mail address

➢ Select "forgotten your password?" to receive a link to re-set the password

Dashboard

➢ Each box represents an action which can be carried out

➢ The number represents the amount of jobs against the action

➢ Click on the box and it will direct you to complete and action

Client Profile

➢ Profile displays your details

➢ Password can be reset here

➢ E-mail notifications will be sent to the email address in the system

Create a job

➢ **Select "New job" or 'Add job'**
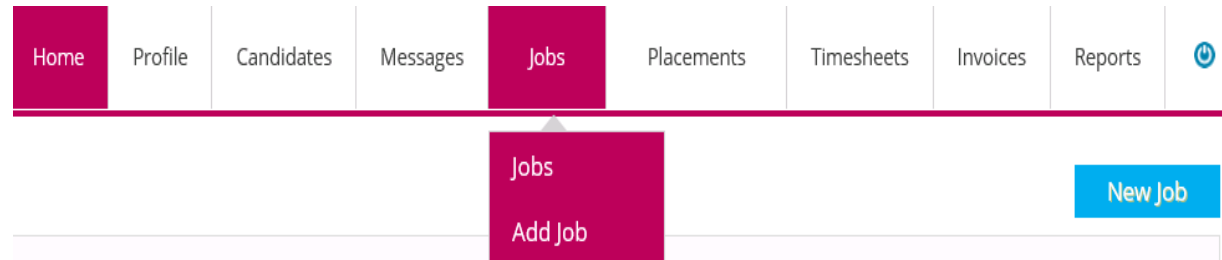
➢ This will take into the job wizard to enter the details of your job
➢ Select where the job will be based
➢ Is it a shift or an assignment?

Hints and tips -
- *Shift: for Singular shifts for different dates/times*
- *Assignment: to be used for any roles longer than 7 days*

Retinue

Create a job

➢ Each job has a unique 4 digit reference

➢ Select from the drop down menu the required worker

➢ Category/ Title/ Justification are pre-defined

➢ Select a reason for the hire i.e short term illness

➢ Location matches the hierarchy you have selected, this is where the worker will be located

Please ensure the correct 'Justification reason' is used against vacancies, as this will be documented on reporting.

Create a job - shift

➢ Enter your shift pattern using the date and time picker, then select the + button to add

➢ Shift will appear below (grey box). Add notes against the individual shift.

➢ Pay rates are dictated by the shift time, if it covers multiple time periods, multiple rates will show

Start:

End:

	Start Date & Time	End Date & Time	Notes	Pay Rate						Candidates		
				Night	Standard	Saturday	Sunday	Sleep-in multiplier	Bank holiday			
1	08/08/17 02:00	08/08/17 09:00		£ 20.00	£ 15.00	£ 20.00	£ 25.00	£ 45.00	£ 30.00	1 +	C 🗑

➢ Select the blue "repeat" button to bring up the calendar

➢ Select the dates on the calendar you would like to repeat the shift

➢ You can add different rate times/ dates and repeat to create a full rota

Candidates

	September 2017						
	M	T	W	T	F	S	S
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10
38	11	12	13	14	15	16	17
39	18	19	20	21	22	23	24
40	25	26	27	28	29	30	1
41	2	3	4	5	6	7	8

Repeat   Close

Retinue

Create a job

- ➢ If the shift pattern is not known, use an assignment job
- ➢ Use the date picker to select an expected start and end date
- ➢ Pay rates shown are potential rates the candidate could claim throughout the duration of their placement

Adding a Job with reference PDGH

Is back dated:	✓	
Start date:		📅
End date:		📅

Rate Values:

Non-Standard	75.00	Standard	60.00

Retinue

Create a job

➢ Standard requirements are items the successful candidate must have in order to complete the role i.e current CV, DBS, References, Right To Work

➢ Click the blue plus icon to add further documentation

Standard requirements

Add new requirement: [Candidate has basic life support? ▼] ➕

	Start	
1	Candidate has basic life support?	🗑
2	Candidate has right to work in the UK?	🗑

➢ **Option**: add multiple documents for the supplier to understand the role

➢ **Option**: free text box to add any additional information needed for the supplier/ candidate

Add new document: [   ] [Select] ➕

	Name	
1	Demo - job description.doc	🗑

Description: [   ]

[Confirm]

Retinue

Create a job

➢ Select cost centre from a drop down menu

Cost centre:

1234	▼
1234	

Confirm

➢ You will be listed as the hiring manager, this can be changed
➢ Select multiple timesheet approvers to ensure timesheets can be approved in times of sickness, annual leave etc.
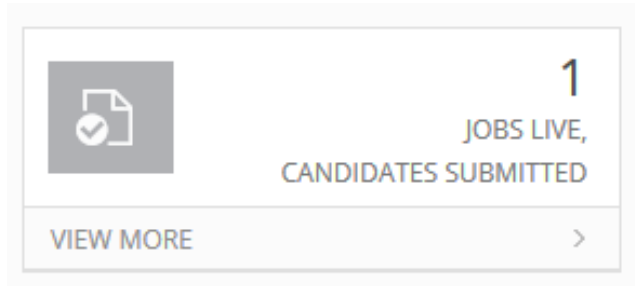
Hiring manager: Gill Dee ▼

Timesheet approver(s): Gill Dee ▼

Save as Draft   Submit

Retinue

Viewing Candidates

➢ When a job has been created, it is Retinue's responsibility to provide you with candidates

➢ Select "Candidates submitted" on the dashboard
➢ Select the job reference number to enter the job
➢ Each job has its own workflow, highlighted tabs show you the status' candidates are in

Viewing Candidates

- ➢ Select "Applied" tab to view candidates
- ➢ View candidate, Agency they are from, how many shifts they are submitted against (if applicable) and their cost per shift (£)
- ➢ Click candidate's name to view their compliance documents
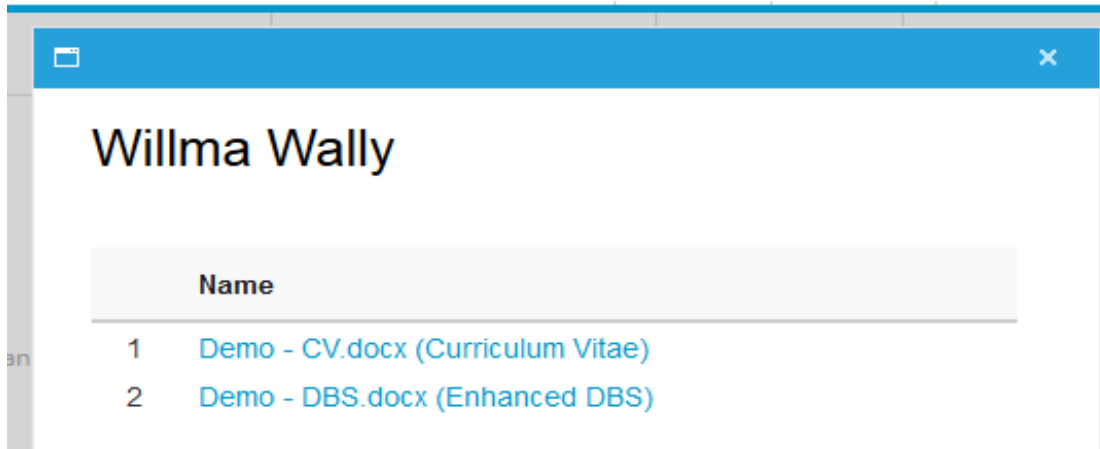
Viewing Candidates

➢ **Once viewed you have 3 options with each candidate**

➢ Reject: Candidate is not appropriate, select from a mandatory drop down reason for why the candidate is being rejected

➢ Request an interview: Bring the candidate in for an interview to understand if they are appropriate to complete the role

➢ Book: Viewing the CV is sufficient to confirm you would like the candidate to complete the work
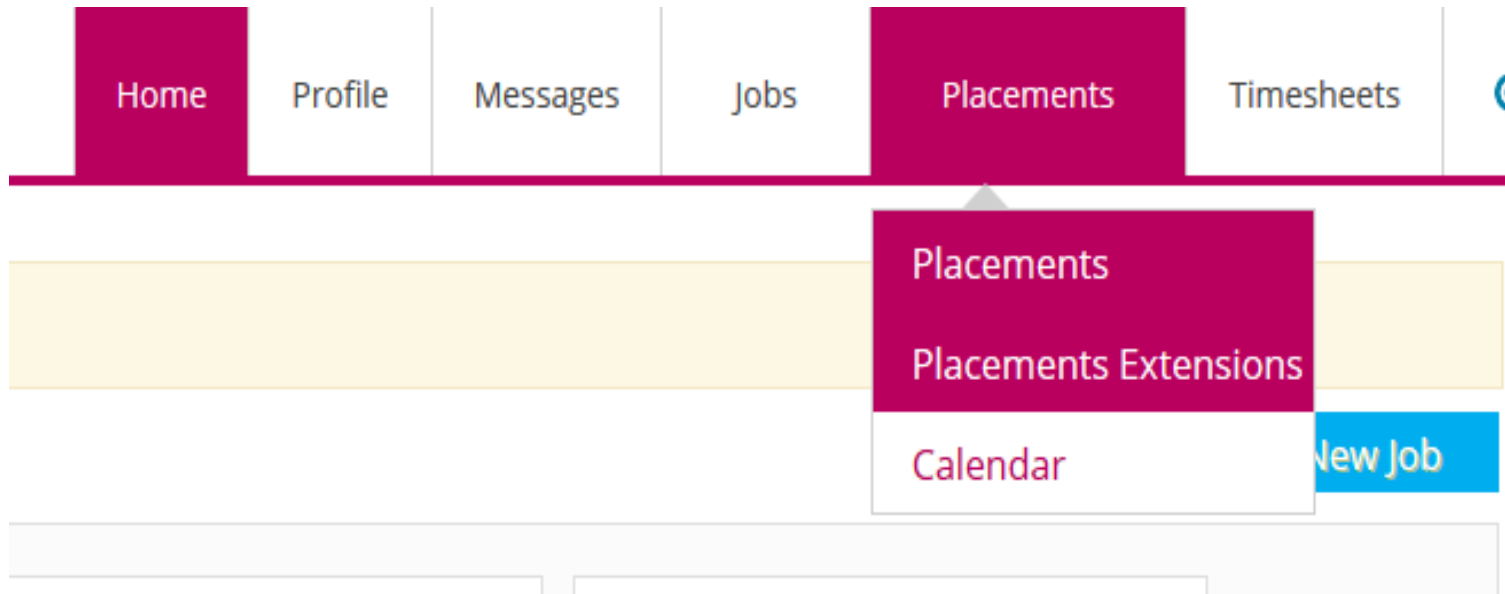
| Request Interview | Book | Reject |

➢ Once the candidate is booked, Retinue will create the placement for the worker and confirm they will be taking the position

Retinue

Shift calendar view

➤ View shifts in a 7 day calendar view to easier understand which workers will be in each day

➤ On the dashboard, hover over the "Placements" tab and select "Calendar"

Retinue

Shift calendar view

- ➤ View 7 days from the current date
- ➤ Move forward and backwards in the calendar to see future or past weeks
  - **Grey**: Shift is filled
  - **Pink**: requires action
- ➤ Use filters along the top e.g. no candidates, candidates to review etc. to confirm what action needs to be taken

Extend placements

➢ Each shift is represented by one placement, if you wish a candidate to fill additional shifts create a new job and request the specific candidate

➢ If it is an assignment covering multiple dates, the end date can be edited to extend the placement
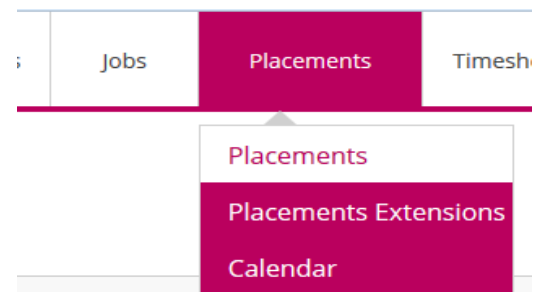
➢ When in placements, select "Edit" against placement that is to be extended

Reference	Client	Job Title	Candidate	Hiring Manager	Date	End Date	Supplier	Location	Categories	Status	Edit
PDVK-1	ICU	Consultant - Adult Mental Health	Michael Carmen	Hayley Todd	14/11/2016	27/01/2017	Pertemps Medical	2 Dragon Parade, Harrogate, North Yorkshire, HG1A 5BY, UK - England	Locums > A&E	Active	Edit
TDTT-133	ICU	Consultant - Adult Mental Health	Nigel Stephorough	Hayley Todd	30/04/2017	30/04/2017	Pertemps Medical	Circle Health Reading, Reading, Reading, RS1 1AA, UK - England	Locums > A&E	Active	

Extend placements

CHANGE PLACEMENT END DATE ✕

Placement extension

Reference: PDVK-1

Candidate: Michael Carmen

Start date: 14 November 2016

End date: 27 January 2017

New start date: [   ] 📅
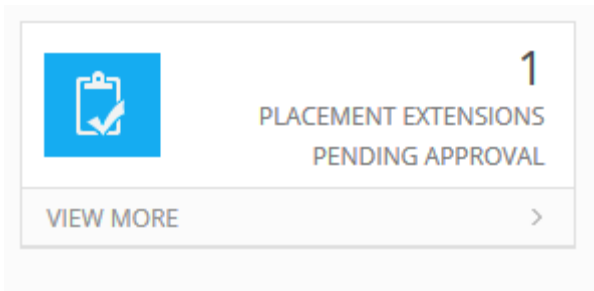
New end date: [   ] 📅

[Save]   [Cancel]

➢ Use the date picker to enter the new end date for the placement i.e. when you want the worker until

➢ It is possible to edit the start date if the candidate started working earlier or later than thoughts

➢ If approval is switched on for placement extensions, select from the drop down menu who is to approve

Retinue

Approving placement extensions

➢ The date changed that required approval will be written in green
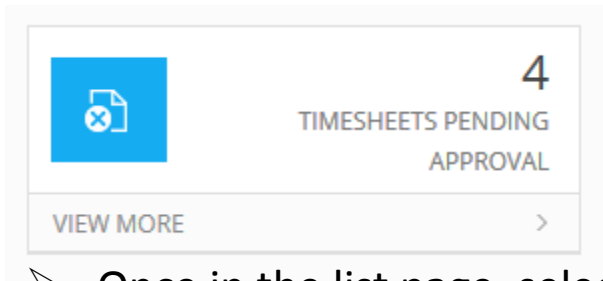
➢ Select the approve/ reject button

➢ If approved, the change in date will be set in the system

➢ If rejected, the date will not changed and the hiring manager will be instructed they cannot have the worker for longer

New End Date: 24/02/2017

Reject   Approve

Retinue

Timesheet approval

4
TIMESHEETS PENDING
APPROVAL

VIEW MORE >

➢ Once in the list page, select the individual timesheet reference number

Standard client rate:	85.51 p/h
Total hours:	#TD5S-5 : 7.00 hour(s)
Total cost:	£598.57
Cost centre T1:	222222
Cost centre T3:	
Direct engagement:	Yes

Working times

Start time and date	End time and date	Unpaid Break	Total time minus breaks	Additional Charges
24 November 2016 09:00	24 November 2016 16:00	0	7 hour(s)	
	Total:		#TD5S-5 : 7.00 hour(s)	

➢ View the hourly rate, the total timesheet cost and any expenses claimed

➢ Details of individual shifts/ dates worked and any breaks taken

Retinue

Timesheet approval

- ➢ The option at the bottom of the timesheet will offer "Dispute" or "Approve"
- ➢ If disputed, it is mandatory to add a reason that will go to the worker to re-submit their timesheet with correct changes
- ➢ If approved, then rate the candidate and confirm if you would have them back to work for you. If "No" is selected, the candidate cannot return to your ward/ location to work without review
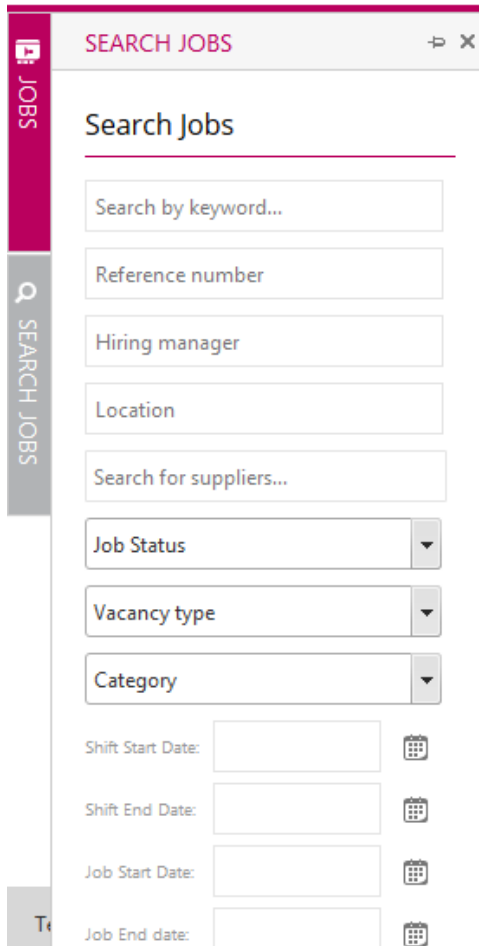
Candidate rating

Would you accept this candidate to work for you again?   ⦿ Yes ◯ No

Please rate this candidate :   ☆ ☆ ☆ ☆ ☆

Save   Skip

Retinue

Reporting

- ➢ Pages built on a grid page allow information to be filtered
- ➢ Select pane on left-hand side of screen to expand search function
- ➢ Once filtered, use excel function to export into excel and build into reports

Support and Resources

For additional support or queries regarding VMS365, please contact the Operations team:

Retinue Operations team on: 020 3837 7880
Retinue queries email: LCCbookings@retinue-solutions.com
Operations Team Manager: Rebecca Anderson